



McMaster University  
Human Resources Services

Inspiring Innovation and Discovery

Pension Transfer from Other Employer Plans to McMaster University  
**Employee Application Form**

Employee Name: \_\_\_\_\_ McMaster ID: \_\_\_\_\_  
(Please Print)

E-mail Address: \_\_\_\_\_ Extension: \_\_\_\_\_

Please Note:  
1. Under the Amendment to the Contributory Pension Plan for Salaried Employees of McMaster University including McMaster Divinity College 2000, section 8.01(a), a member, who immediately prior to entering the service of the University was a participant in a previous employer's registered pension plan may transfer to the Fund monies payable from such previous registered pension plan, subject to the consent of the University.  
  
2. Under the Amendment to the Contributory Pension Plan for Salaried Employees of McMaster University including McMaster Divinity College 2000, section 8.01(b), as a result of the transfer to the Plan under Section 8.01(a) and subject to the certification of any past service adjustment (as defined under the *Income Tax Act*), the University shall grant to the Member the amount of Pensionable Service which can be purchased by the transferred amount, based on the recommendation of the Actuary. For the purposes of this Section 8.01(b), and Section 8.1(e), if applicable, such Pensionable Service shall be classified as "Pensionable Past Service".

Employee Date of Birth: \_\_\_\_\_ Gender:  Male  Female

Spouse's Date of Birth: \_\_\_\_\_ Gender:  Male  Female

Name of Former Pension Plan: \_\_\_\_\_  
Service in Former Pension Plan: \_\_\_\_\_  
Value of Locked-in Pension (Lump-sum): \_\_\_\_\_  
Date of Pension Value Calculation: \_\_\_\_\_  
Termination Date from Prior Employer: \_\_\_\_\_

\_\_\_\_\_  
*Signature of the Employee* \_\_\_\_\_  
*Date*

The information provided above will be forwarded to McMaster's actuaries who will provide us with a calculation. The calculation will outline the amount of service you are able to 'purchase' under the McMaster Salaried Pension Plan if you wish to transfer your pension value from previous employer. If additional funds are required to purchase the full service from previous employer, you will have the option of providing McMaster with a personal cheque for the difference. As transfers are complex in nature and involve the current and prior administrator please note that processing can take 3-6 months.

**Note: Please supply copies of any supporting documentation with this application.**

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**Contact Information:**  
Human Resources Services, CSB Room 202  
1280 Main St. West, Hamilton, ON L8S 4L8; Phone (905) 525-9140; Fax (905) 525-8410  
Email: [working@mcmaster.ca](mailto:working@mcmaster.ca)  
[www.workingatmcmaster.ca](http://www.workingatmcmaster.ca)

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The information gathered on this form is collected under the authority of the *McMaster University Act*, 1976. The information is used for the academic, administrative, employment-related, financial and/or statistical purposes of the University including, but not limited to, admissions; registration and maintaining records; awards and scholarships; convocation; provision of student services, including access to information systems; alumni relations; and disclosure to or on behalf of the applicable McMaster student government. This information is protected and is being collected pursuant to section 39(2) and section 42 of the *Freedom of Information and Protection of Privacy Act* of Ontario (RSO 1990). Questions regarding the collection or use of this personal information should be directed to the University Secretary, Gilmour Hall, Room 210, McMaster University.